

Figeroux & Associates

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Wills Questionnaire Summer 2011

Many people associate writing a will with dying. This is not the case. A will not only benefits those that survive you, but they benefit you also. For example, by writing your will, you can determine who would be the guardian of your children and how your current assets or lawsuit assets (accident) would be distributed. Without a will the State, by statutory law, would decide the distribution of your assets. Please complete this Questionnaire in order that we can best serve you and those you may recommend. THE ANSWERS YOU PROVIDE WILL BE USED TO EVALUATE OUR COMMUNITY'S NEED FOR ESTATE PLANNING SERVICES. THE INFORMATION GIVEN WILL BE KEPT STRICTLY CONFIDENTIAL.

FOUNDATION QUESTIONS:

Do you have a will? yes no

If so, how many years ago did you make it? _____
How many wills have you made? ____

Have you ever modified a will?
 yes no

Do your parents have wills?
 yes no don't know

Do your adult children have wills?
 yes no don't know

If your parents or children have wills, do you know, roughly, what their terms are?
 yes no

IF YOU HAVE A WILL:

What inspired you to write your will?

Check all that apply to you

- Getting married
- Having a child
- To avoid family conflicts
- Getting divorced
- Getting older
- Concerned about guardianship
- Other _____

Did you hire a lawyer to prepare your will? yes no
If yes, how much did it cost? \$ _____

If no, did you use any of the following?

- Self-help software. Name: _____
- Self-help will-book. Name: _____
- Self-help will-forms. Name: _____

Can you read your will and understand all of it? yes
 no

If you have adult children, do they know, roughly, the terms of your will? yes no

IF YOU DO NOT HAVE A WILL:

Why not? Check all that apply to you.

- I haven't gotten around to it.
- I'll do it when I'm older.
- I don't need one, because if I died without a will my property would go to the person I want to get it anyway.
- I don't need one, because I don't own enough stuff to worry about.
- I want to go to a lawyer but can't afford it now.
- I'd rather not think about the whole subject.

What would make you write a will?

Check all that apply to you

- Getting married
- Having children
- Getting divorced
- Getting older
- Buying a home

Are you interested in a consultation on the legal issues listed below? Then please check your choice(s) below and we will schedule a meeting with an attorney.

- Tax & Financial Planning For Individuals
- Save Your Home From Foreclosure
- Estate Planning & Wills
- How to get a green card

COMMENTS: _____

SUMMER 2011

Figeroux & Associates

Wills & Estate Consultation

Fee includes simple Will preparation, if deemed necessary by attorney

Client Information

| | | |
|--------------|-------------|------|
| Your Name: | SS#: | |
| Spouse Name: | SS#: | |
| Telephone #: | Cell Phone: | |
| Address: | | |
| City: | State: | Zip: |

List of Children

| Name | D/o/b | Address |
|------|-------|---------|
| | | |
| | | |
| | | |
| | | |

List of properties owned:

| Address | City | State and Zip |
|---------|------|---------------|
| | | |
| | | |
| | | |

Notes:

| |
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| |
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RECEIPT FOR PAYMENT OF CONSULTATION FEE IN LIEU OF RETAINER

This acknowledges payment to Figeroux & Associates, a fee of \$_____ as payment in full for their time and evaluation pursuant to a consultation on: _____, 201____. At the consultation, Figeroux & Associates relied on the answers to the questions/comments completed by me above, together with my oral comments.

At this time, I have decided to neither hire nor to retain the legal services of Figeroux & Associates. Further, Figeroux & Associates decided not to accept my case at this time. Figeroux & Associates is under no obligation whatsoever to represent any of the parties mentioned in the attached questionnaire. This is very important because I understand there may be time deadlines associated with the legal objectives sought and the benefits that may be obtained.

If a decision is reached within the next 30 days to employ the services of Figeroux & Associates, the payment for today's consultation will be credited toward the additional legal fees expected to be paid for Figeroux & Associates services.

By: Figeroux & Associates

Consultee's Signature